

# **CHARTER (DRAFT)**

## **SUB-TEAM NAME**

### ***CUSTOMER RELATIONSHIP MANAGEMENT BEST IN BUSINESS***

## **SHARED AND MEANINGFUL PURPOSE-** **PURPOSE-**

- Identify Best Practices for:
  - Improving customer satisfaction
  - Reducing unit costs
  - Improve customer relationship management in a timely manner through the medium that best meets their needs, i.e. phone, web, paper
  - Promoting electronic business while maintaining easy access to paper

## **WHY NOW?-**

The PBO Performance Objectives and the Customer Service Task Force Report both make a strong request for a single number for all student calls by September 2000.

This initiative has the greatest potential to affect the PBO goals, enterprise-wide.

## **VISION OF SUCCESS-**

## **GUIDING PRINCIPLES -**

☑ Remain customer focused, not process focused

- Best in Business
- Reliable and consistent
- Worthy of trust
- Implement Quick Hits
- Provide immediate customer benefit

## ***SPECIFIC AND CHALLENGING GOALS-***

<b>TOPIC</b>	<b>PERFORMANCE INDICATOR</b>	<b>GOALS</b>	<b>FUTURE PURPOSE</b>
Team Assembly	Commitment of sub-team members to the task and responsibilities	<ul style="list-style-type: none"> <li>• Gather the team members</li> <li>• Review roles and responsibilities</li> <li>• Obtain commitments</li> <li>• Establish regular meetings</li> <li>• Completion by 6/30</li> </ul>	•
Expert Identification and Enrollment	<ul style="list-style-type: none"> <li>• Agreement on and enrollment of Best Practice experts</li> <li>• Agreement on Best Practices data gathering plan</li> </ul>	<ul style="list-style-type: none"> <li>• Research and enrollment of Best Practices experts</li> <li>• Develop a data gathering plan</li> <li>• Obtain core team consensus</li> <li>• Completion by 6/30</li> </ul>	•
Best Practices Development	<ul style="list-style-type: none"> <li>• Complete Data gathering</li> <li>• Complete summary document</li> </ul>	<ul style="list-style-type: none"> <li>• Survey of Best in business &amp; Data Gathering</li> <li>• Compilation of results (include feasibility analysis)</li> <li>• Completion by 8/11</li> </ul>	
Gap Analysis ( <b>Participate with Current State</b> )	<ul style="list-style-type: none"> <li>• Completed Gap Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• GAP analysis between Best in Business and Current State</li> <li>• Completion by 9/01</li> </ul>	
Solution for the future	<ul style="list-style-type: none"> <li>• Recommended solutions</li> </ul>	<ul style="list-style-type: none"> <li>• A list of recommended solutions and a business case for each</li> <li>• Management Council agreement on solutions that will be implemented</li> </ul>	❖ Completion by 9/09

## **SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS -**

Note: To be determined during discovery process

<b><u>CLEAR ROLES-</u></b>	
<b>Sponsor</b>	Jeanne VanVlandren
<b>Core Team Leader</b>	Dena Bates
<b>Sub Team Leader</b>	Denise Hill
<b>Recorder/Documenter</b>	
<b>Facilitator</b>	
<b>Sub Team Members</b>	
Vincent Ferrer (P/T – Schools)	Vincent-Ferrer@ed.gov
Richard Windham (F/T – AC)	Richard.Windham@ac.com
Chris Hill (P/T – CIO)	Chris_Hill@ed.gov
Diane Clark (Provide Input)	Diane Clark
Scott Reynolds (Provide Input)	
Varlerie Sherrer (P/T)	
Dan Opperman (P/T – SF Region)	Dan_Opperman@ed.gov
Paul Steinhauer (P/T – NCS (CPS/FAFSA)	Steipa@ncs.com
Marilyn LeBlanc (Provide Input)	Marylyn_LeBlanc@ed.gov
Sandy England (ECAD)	<a href="mailto:Sandy_England@ed.gov">Sandy_England@ed.gov</a>
Dee Carter (Customer Support Branch)	<a href="mailto:Dee_Carter@ed.gov">Dee_Carter@ed.gov</a>
Barbara Anderson (EDS)	<a href="mailto:Barbara.anderson@eds.gov">Barbara.anderson@eds.gov</a>
Jason Sellers (Ombudsman)	<a href="mailto:Jason_Sellers@ed.gov">Jason_Sellers@ed.gov</a>
Chuck Priddy (EDS)	<a href="mailto:Chuck.Priddy@eds.gov">Chuck.Priddy@eds.gov</a>
Barbara Bolden	Barbara_Bolden@ed.gov
<b>DECISION-MAKING-</b>	<ul style="list-style-type: none"> <li>• Preferred approach – team consensus on recommendations</li> <li>• Fall-back approach – team leader and/or business owner where consensus cannot be achieved</li> <li>• Recommendations from the Core Team to the sponsor as the final decision maker</li> </ul>
<b><u>A COMMON AND COLLABORATIVE APPROACH-</u></b>	
<b>AN AGREED UPON PROCESS MAP AND WORK PLAN-</b>	
Refer to the process map	

**OPERATING AGREEMENTS AND PRINCIPLES - how we want to work together-**

- Communicate information to each other
- Establish and maintain timelines
- Consistent meeting time
- Complete assignments by the due date
- Show up on time
- Start and end on time
- Distribute documents timely
- Read read-ahead materials
- Resolve to deal with Core Team issues – resolve them, do not let them fester
- Respect all options
- Notify the Team Leader when unable to attend meetings

Sub team may add items

**HOW OFTEN THE TEAM WILL THE SUB-TEAM MEET AND OTHER KEY AGREEMENTS-**  
Tuesdays 2-4 pm

**COMPLEMENTARY SKILLS AND RESOURCES-**

**KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS-**  
TEAM TO DEVELOP OR KICK - OFF

**COMPETENCY REQUIREMENTS FOR THE TEAM-**  
tbd

**RESOURCE REQUIREMENTS-** –(time, people, money, materials)

<b><u>OTHER</u></b>